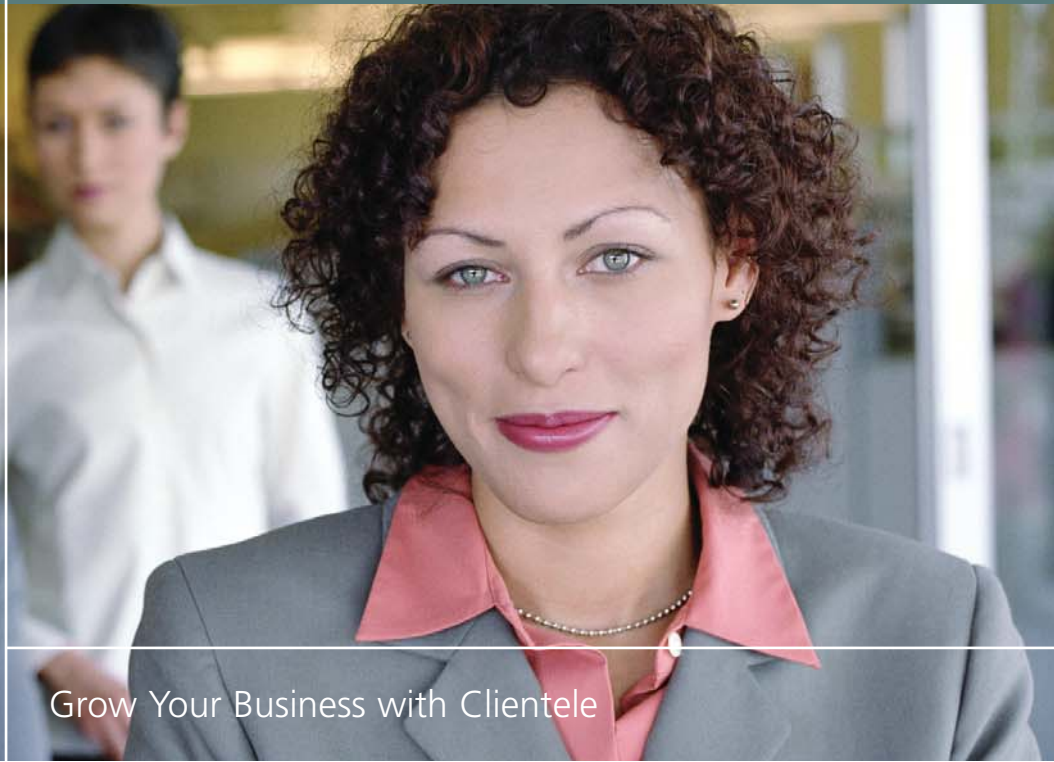




Clientele Sales



Grow Your Business with Clientele

Benefits

The primary goal of many businesses is to grow their revenue. Whether your growth will come through attracting new customers or retaining existing ones, Clientele® Sales can help you. Clientele Sales strengthens your ability to increase revenue by enabling you to convert more prospects to customers and target the highest value opportunities. Clientele aids the retention of existing customers by enabling proactive communication and ensuring everyone who interacts with customers has complete information at their fingertips.

Clientele Sales can improve both the efficiency and effectiveness of your sales team. It helps sales teams manage their opportunities and automate many administrative tasks — allowing your sales professionals to focus on the building of relationship and revenue.

When combined with Clientele Customer Support, Clientele Sales allows sales representatives to view existing support requests, product registration information and service agreement timeframes, ensuring that important sales opportunities are not missed.

The Clientele CRM.NET Suite

The Clientele CRM.NET Suite is a set of enterprise CRM applications for small to midsized companies that are focused on their customers. Clientele CRM.NET is the first CRM application built entirely on the Microsoft .NET platform, which provides new levels of accessibility, extensibility and integration. It's our award-winning CRM software, with 15 years of features and functionality behind it.

Selling is both an art and a science.

The art belongs to the salesperson — listening to the prospect, knowing what to say and when, and ultimately closing the deal. The science belongs to Clientele Sales. Clientele Sales helps salespeople be more efficient and more effective.

Efficiency is derived from having a single source to record information about sales opportunities, schedule appointments and reminders to follow up, and being able to share opportunity information with everyone who might talk to the potential customer.

Effectiveness is realized by utilizing a product that puts competitive information on hand to answer customer questions, by reinforcing a structured sales methodology that reminds salespeople what should be done to move a potential customer forward in the sales cycle, and by giving everyone on the sales team - from the sales person to executives - access to information on what is important to the potential customer.

Equipped for Success

With Clientele, sales teams can manage and track all customer interactions and share that information with all team members. The sales manager or sales engineer can review customer interactions and record their own, so everyone on the team has a comprehensive real-time view of all sales activities.

Clientele Sales allows you to manage customer interactions by providing a complete view of their purchase history, existing contracts, support requests and more. And by allowing you to prioritize sales activities, Clientele helps you focus on your best prospects.

Sales milestones allow sales reps to track how their opportunities are moving through the selling process. When coupled with a structured selling process, milestones remind sales reps of what tasks or selling activities need to occur at each stage of the process. Using Clientele, sales managers can track how well sales reps are moving opportunities through the process and proactively spot trends or problems with individual reps or pending deals.

Capture Leads

With Clientele Sales, you can manage virtually the entire life cycle of a sales opportunity — from the time it enters your system as an inquiry to its conclusion as a new customer. You can easily capture critical prospect and customer information and share it with others throughout your enterprise. Plus, you can automate many routine tasks, freeing your sales professionals to concentrate on closing more deals.

Clientele Sales

Increase Sales Efficiency

With Clientele Sales, you can track milestones, schedule follow-ups, convert an opportunity to a quote, track multiple quotes for the same opportunity, and place the order. By providing a single information resource for managing customer information and sales activity, Clientele helps drive efficiency in the sales force. The Action Plans feature allows you to reinforce a structured sales methodology, with templates for various sales processes that provide preset tasks and appointments needed to win the business.

Enhance Sales Effectiveness

Clientele Sales helps you focus on the right opportunities at the right time. Pipeline management and forecasting are built-in, providing feedback on total pipeline value, number and value of sales opportunities at each selling stage, and sales period forecasts based on estimated close dates. Sales managers can review sales opportunities on-line and quickly ramp up on new opportunities when called in to close a deal.

Designed for the Customer-centric Enterprise

Clientele Sales is part of the Clientele CRM.NET suite, an integrated solution for managing customer-centric processes. Clientele CRM.NET helps simplify business flow because everyone in the organization is using the same tool to manage customer interactions. Whether entering a lead, working a sales opportunity or providing post-sales support — your enterprise and your customers are kept informed.

Easy to Use

Clientele is a smart client application that uses the Internet to interact with XML Web services. It employs common user interface controls and has an easy to learn and use navigation paradigm. Strong searching capabilities make locating specific data fast and easy. Clientele's liberal use of visual cues helps users find critical information quickly. Plus, Clientele supports attaching files or Web links to almost every record.

Easy to Customize

Because Clientele is highly customizable, it works the way your business does, not the other way around. Module options enable you to adapt it to fit your needs without touching a line of code. Plus, Clientele boasts two types of customization. You can modify existing screens and business rules using Visual Studio .NET, or you can develop new functionality in Visual Studio .NET by inheriting from Clientele Web services and form templates.

Robust Reporting

Clientele Sales provides many predefined sales reports, offering both sales reps and sales managers a comprehensive view of sales pipeline and activity. Clientele uses Crystal Reports as its reporting system which allows reports to be designed with Visual Studio .NET or Crystal Enterprise 9 or higher.

Integrated with Microsoft® Office

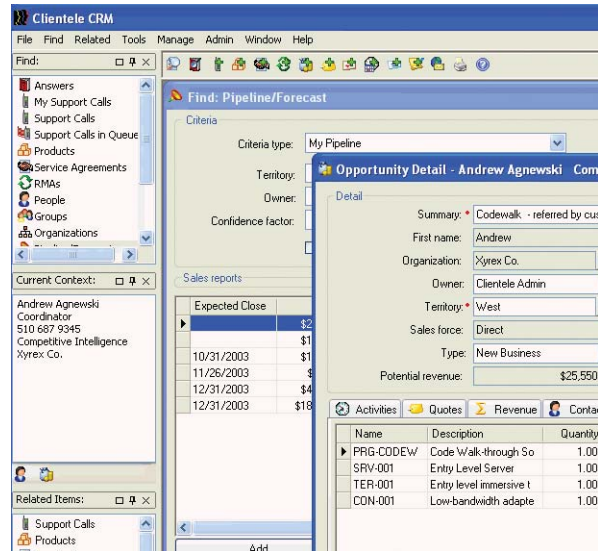
Clientele provides integration with several Microsoft® Office applications. Search results can be exported to Microsoft Excel®. Letters can be sent to customers using Microsoft Word. Clientele supports distribution of approved Word templates which can be used to create a single letter or a mail merge to a list of customers or prospects. And Clientele provides bi-directional synchronization with Microsoft Outlook® Contacts, Appointments and Tasks.

Build World-class Sales Teams

Epicor Software Corporation is a trusted provider of customer relationship management software for small and mid-sized enterprises. With more than 15 years experience and over 3,000 customers, we supply virtually everything you need for a successful CRM implementation: quality products, experienced professional services and excellent support.

Learn More

For more information on how Clientele can help you provide your customers with world-class sales and service automation, contact your authorized Epicor Partner, or call Epicor at 800-997-7528. Or visit us on the Web at clientele.epicor.com.



→ Clientele Sales manages all your opportunities from prospect to customer.

Key Features

Learn more about the technical merits of Clientele by reading our CRM.NET Architecture white paper.

- All in one - Account, Contact, Lead, Opportunity, Quote, Activities, and Territory Management
- Territory Management with Multiple Sales Forces
- Sales Milestones and related Confidence Factors
- Sales Pipeline and Forecast by Territory or Product
- Lead and Opportunity Management and Tracking
- Action Plans for managing sales cycles
- Multiple Quotes per Opportunity
- Sales Orders Generated from Opportunities or Quotes
- Complete History of Sales Activities
- Appointments, Tasks, Correspondences, and Notes
- Microsoft Office Integration
- Integrated E-mail Messaging
- Integrated Crystal Reports

Expand Sales reach with eMail Marketing

Epicor eMarketing allows you to swiftly design and deploy targeted email campaigns that deliver measurable results. It is also an excellent tool for distributing important communications with your employees, partners, prospects and customers.

To learn more see the Epicor eMarketing Product Brief.



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